HORIZON
Unlimited communications

Receptionist Console User Guide

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1.0 Introduction and Purpose

The Horizon Receptionist Console has been designed to be used in conjunction with the Horizon service and it enables the use of a web based attendant console specifically developed for hosted environments.

The console provides a full set of call control features, large scale line monitoring, queuing, multiple directory options and views which are all key requirement for large or distributed organisations.

This document is designed to explain the core features of the receptionist console, as well as the steps needed to install and access the service and the use cases that can be applied.

2.0 Common deployments of the Receptionist Console

The traditional receptionist role combines both screening of incoming calls for key areas of the business as well as ensuring core call routing is working as efficiently as possible to deliver calls to the right locations.

The receptionist console provides the following real world benefits:

- An easy to use interface aligned with the core Horizon service
- An ergonomic design that follows a natural workflow of a call from left to the right side of the screen
- Improved efficiencies as only "valid" options are presented to the user
- Professional call handling as critical information is available in "real time" to the user
- Web based interface accessible through the web browser even whilst on the move

2.1 Fixed Receptionist Console

The fixed receptionist console utilises either Cisco or Polycom phones and sidecars to provide a "bank" of up to 50 monitored contacts in order to manage incoming calls and deliver them to appropriate resource.

The receptionist would traditionally answer or blind transfer all incoming calls to key contacts and this can still be combined with the soft receptionist console.

2.2 Soft Receptionist Console

The soft receptionist console utilises a web based attendant console to monitor and manipulate incoming calls and call routing of core features such as call queues. Using the console, the receptionist is able to monitor or search a directory of up to 800 contacts as well as pin a fixed list of 200 “favourite” contacts to their console for simple monitoring of call groups or contacts.

The receptionist can manage multiple calls via an easy to use web interface providing additional information about the call. Additional features are also available such as the ability to attach a caller to a specific extension for when it becomes available, through to managing ad hoc conference calls or adjusting the order of callers in a queue.

The soft receptionist console can be used for a single number or a single user however it is predominantly used for larger or multiple site solutions.

2.3 Multiple Site Receptionist

Due to the cloud based structure of the core Horizon service and receptionist offerings, the ability to have just one receptionist managing multiple sites and main numbers is achievable. Call routing shared over multiple locations can easily be monitored, as well as the ability to bring in additional resource during busy periods at specific sites.

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2.4 Monitoring of key call routing and basic CRM

Whilst the receptionist role is the main one met by this service, managers of specific teams may also find it of use to monitor key call queues or users and to keep specific customer notes. By seeing the number of callers within a call queue, additional resource or routing could be implemented. At the same time the ability to leave notes in the system against a directory contact, both internal and external, means a base level of CRM is achievable, as well as any internal notes being visible, for example someone being away on leave.

2.5 Business Continuity

The functionality provided to a receptionist user is available wherever they are as a result of the core service being hosted in an ISO accredited carrier data centre. As such, in the event of not being able to get to your usual office location, you are can use forwarded landline and/or mobile destinations as well as hot-desking to deliver calls to your phone.

At the same time the console for management purposes can easily be accessed over home based devices or tablet/mobile broadband connections.

3.0 Service Limitations

The following service limitations currently apply to the receptionist console service:

- The console can currently only be used in Internet Explorer
- The console can be used on desktop/laptop devices which we have no control over and can therefore offer no support on. The customer should refer to the equipment provider/maintainer/IT manager for support of these devices and services/programmes
- The minimum required screen resolution for the console is 1024 x 768 pixels
- Only one session of the console should be open on the desktop/laptop at any one time with no other tabs open
- Call notification will not currently show the leading 0 on the call notify window
- Parking a held call does not currently clear the call from the user i.e. if a call is on hold and the receptionist presses the "Park" button, the call is not cleared from the user's phone and the call has to be un-held to proceed with the park procedure
- We have seen in some rare instances, calls still showing as live when generated from the receptionist even when they have been rejected by the called party.
- Polycom phones cannot currently handle automatic answer for click-2-dial if engaged on another call.

4.0 Using the service

4.1 Getting started

The soft receptionist console is hosted within a core carrier class data centre that is ISO accredited and is accessible via a secure web connection. We do recommend that any deployment is based on:

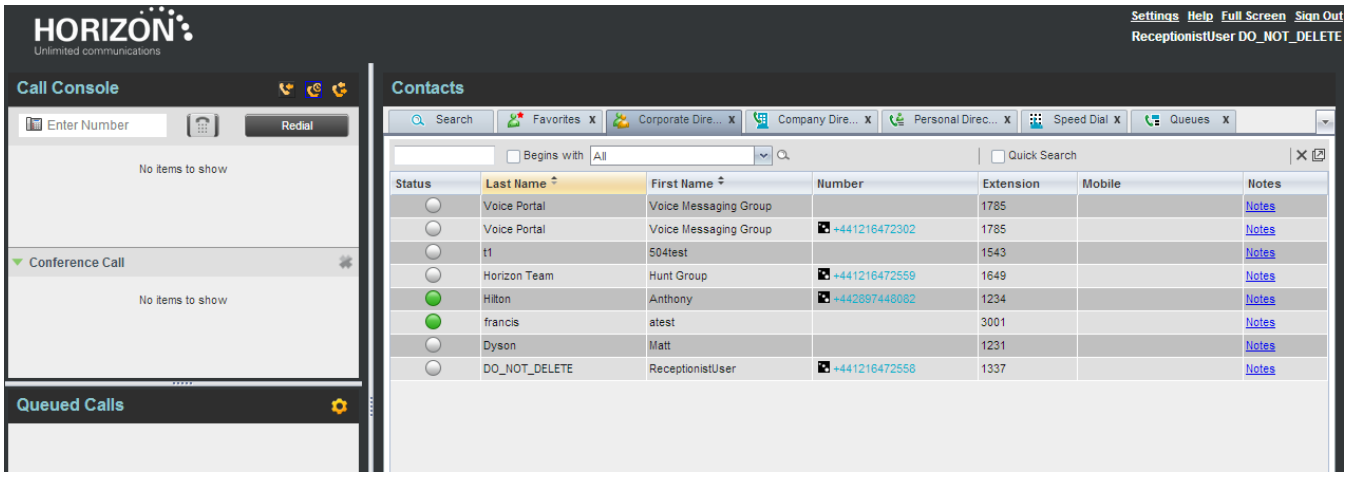
- A Windows platform
- Running Internet Explorer
- Running without tabs in order to enable the "Focus Window for incoming calls to work"

Log in to the service by going to https://xsp.unlimitedhorizon.co.uk/receptionist and this will direct you to the main login page for the console.

Then you simply enter the provided username and password and click "Sign in" to get to the home screen.

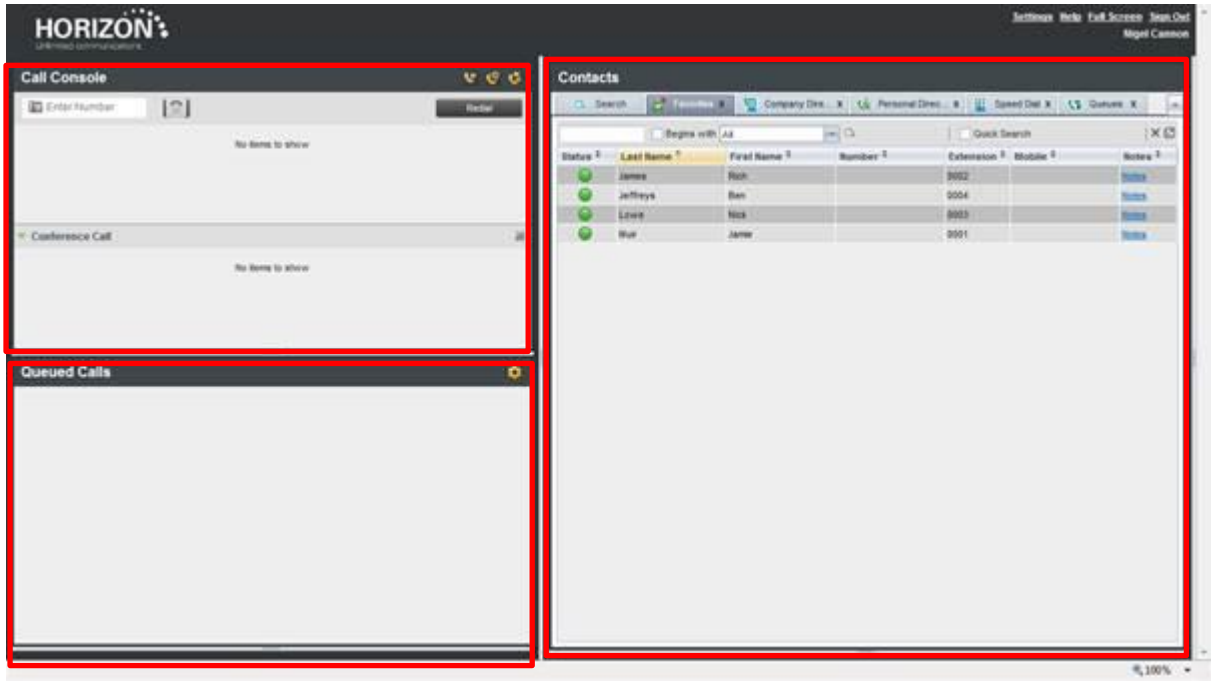
It is worth noting that the password cannot be changed but it can be saved once you have logged onto the console.

The home screen of the service will default to the standard view when you first login however can "save your workspace" when you exit the console on each use.



4.2 Console Overview

When you first login the main screen you will see is the call console which is split into 3 sections - Call Console, Contacts, and Queued Calls.



There are several options on the toolbar to help configure the service to your requirements under ‘Settings’.

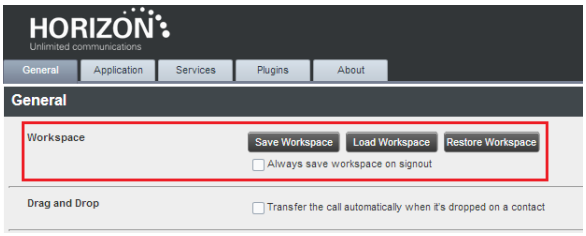
4.3 Settings

In order to ensure the soft console is configured to your day to day use, a number of options are available to configure the service. Simply click the relevant tab, and adjust the settings required.

4.3.1 General - Workspace

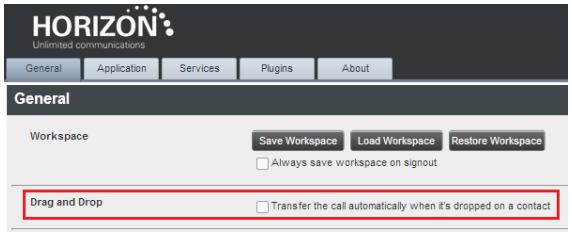
The workspace within the call console can be configured to always show your pre-defined view of contacts or queues when you first login to the service.

You can "Save", "Load" or "Restore" a workspace as well as ensuring your space is automatically saved when you log out.

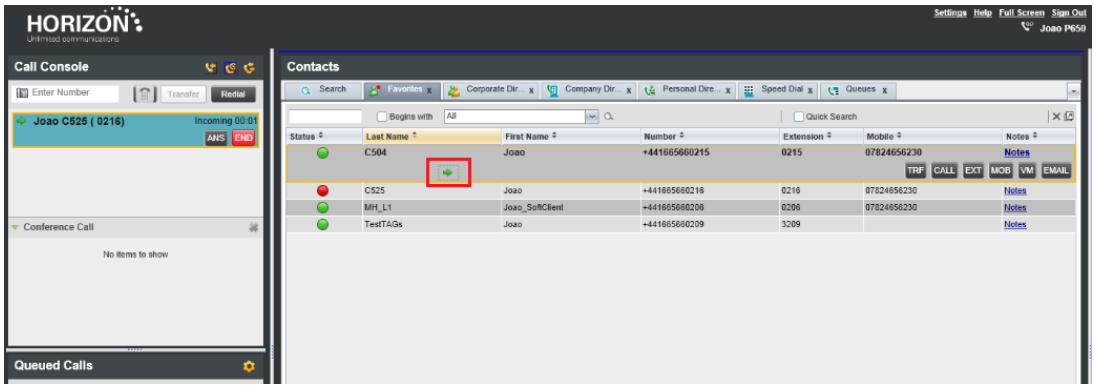


4.3.2 General - Drag and Drop

The call console has the ability to enable drag and drop of incoming calls onto key contacts so you can simply drag a call to the contact instead of performing multiple clicks to action the required move.



By default, this option is always selected but it can be changed by un-ticking the box.

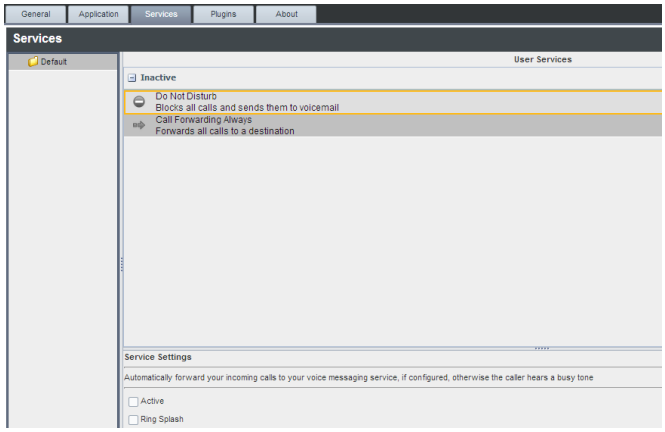


4.3.3 Application

User needs to have call queue group user bolt-on to allow visibility of the subscribed queues.

4.3.4 Services

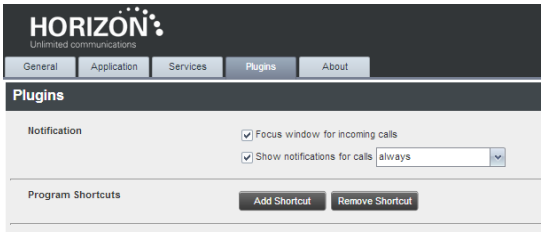
As well as managing your telephone calls, the receptionist console is also able to manage features or services assigned to your user account. To activate these, simply click on the relevant tick box and specify the required information.



4.3.5 Plugins - notifications

The receptionist console has the ability to also interwork with your Windows desktop by bringing the receptionist console window to view from a minimised state when incoming calls are visible.

To configure this feature, you simply need to define your requirements under the Plugin section.



Focus window for incoming calls brings the browser window to the front of your screen when incoming calls are presented.

NB please note that this will only work where the console is minimised not "hidden" on the screen, and where a "non-tabbed" browser window is used.

4.3.6 Plugins – Program Shortcuts

At present, program shortcuts cannot be downloaded to the desktop.

4.3.7 About

This will show you details of the core application and the current version of software. These details may be needed when raising support calls.

4.4 Help

This link will take you to the online user guide.

4.5 Sign Out

This link will sign you out of the receptionist console, and if not set by default, will ask if you want to save your "workspace".

Please note that logging out of the console does not log you out of your fixed phone!

4.6 User

The user name indicates which Horizon account you are logged in as and shows the following additional information to the left of the name:

Do not Disturb (DND) enabled – this has precedence over all other icons except voice message

Call Forwarding Always (CFA) enabled

Busy Call state

Voice Message

Call parking information is also shown with details of the first name, last name and the extension that the call is parked against.

4.7 Call Action Buttons

When managing incoming or making outgoing calls there are a number of call action buttons that could display within the relevant sections of the console.

As part of the design of the console, only valid options will be displayed to the user in the relevant section.

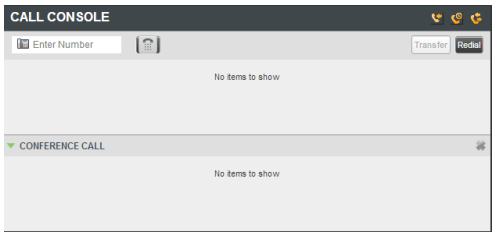
The full list of buttons is as follows:

This dials the number entered into the dialler box. It can be used during most call states to transfer to external numbers or to implement any required codes

CALL	This places a call to the selected contact or to a number from the call history logs
Redial	This redials the last dialled number
EXT	This dials the contact's extension number
MOB	This dials the contact's mobile number
EMAIL	This brings up a new email message window with the contact's email address added
Transfer	This will transfer a call to an ad hoc number entered in the dialler
TXR	This transfers a call to a selected number or contact
VM	This transfers a call to the selected contact's voice mail
ANS	This answers an incoming call, answers an unanswered call to a monitored contact, or resumes a held call
HOLD	This places the call on hold
END	This ends the call selected
CONF	This establishes a conference call or adds a call to a conference
PARK	This parks a call on a contact
PROMOTE	This promotes a selected call to the next higher priority bucket
RETRIEVE	This retrieves a selected call from the queue to the receptionist's device
REORDER	This changes a selected calls position in the queue
	This deletes a call log from call history

4.8 Call Console

The call console is the initial part of the screen where all calls will be shown and appropriate management of the call routing can be implemented.



The following sections are available to assist with managing calls.

4.8.1 Call Console - Header

Within the header of the call console you will see a number of icons allowing you to access additional functionality:

Call History	This allows you to access a list of previous calls
Call Waiting	This allows you to enable Call Waiting
Auto Answer	This allows you to enable Auto Answer, connecting every call to your attached phone straight away

4.8.2 Call Console - Dialler

The dialler within the Call Console section allows you to type any number (with the appropriate country code if applicable) to connect a call. To do so simply type the number into the "Enter number" box, and click on the dial icon

The action buttons to the right of this section become active depending on the relevant call state and allow you to click to take to enable call routing.

When using the dialler to make outgoing calls, please note you will need to answer the incoming call on the console or on your phone to connect to the number dialled.

4.8.3 Call Console - Current Calls

Beneath the dialler and header is the current calls section of the console where all active calls being dealt with will be shown.

Each call within here is listed on a separate line with the following information:

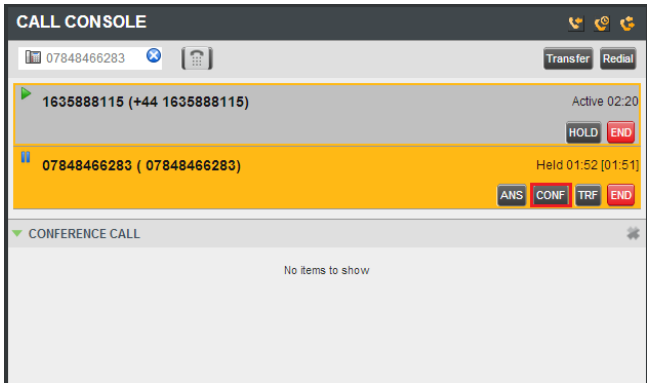
- Number of the calling party - recalled information also shown when being recalled from a specific destination

- Call state icon - visual representation of the state of the call
- Call state name - the display name of the current call state
- Call duration - this is the duration of the call from the time it was put into the current state. For example if a call has been put on hold then this will be the on hold time for that call
- Actions buttons - as with the "header", specific action buttons will be displayed depending on the action that you can take

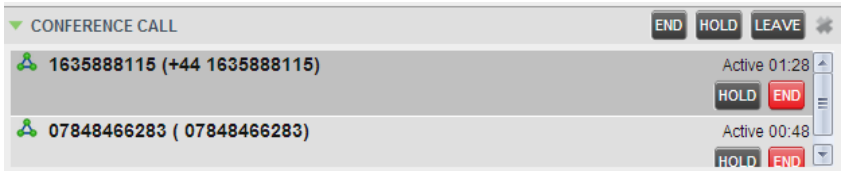
4.8.4 Call Console - Conference Calls

The Conference Call panel displays any established conference calls and allows you to manage them as required. Please note that you can only be involved in one conference call at a time.

In order to establish a conference call, you need to have two or more calls active within your main call console and can then take further actions against these calls.



Pushing the conference button then adds the calls and your line into conference.



Once established you then have further options you can perform

HOLD	Allows you to place all conference members on hold
ANS	Resume allows you to resume the conference
LEAVE	This allows you to leave the conference but maintain the bridge for the other parties
END	This will end the conference and all parties will be disconnected

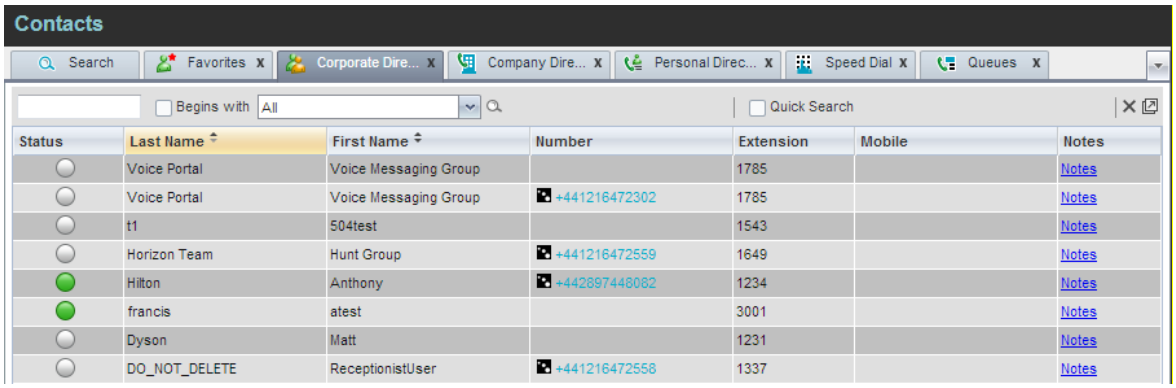
4.8.5 Call Console - Call States

During both normal and conference calls, the following call states and actions can be performed:

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, Park, Camp, End, Conference
On Hold	Held		Any	Transfer, Resume, Park, Camp, End, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active		Conference	Transfer, Hold, End
Held (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Recalled		Terminator	Answer, Conference, End
Parked Call	Parked (<DN>)		Any	Answer, End

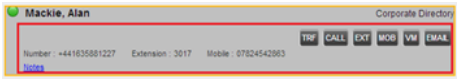
4.9 Contacts

The contact section of the receptionist console provides you with all contacts loaded into the Horizon portal and splits them into the relevant categories allowing quick and easy connection of calls by utilising the “tab” layout.



You can browse contacts by using the scroll bars and directory sections or via the search bar at the top of the each pane.

Once a contact is selected, you can then see further information about them as well as relevant action buttons being available.



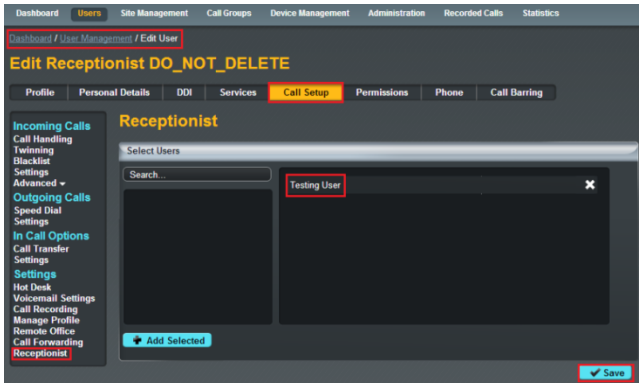
4.9.1 Contacts - Adding directory contacts

All directory entries can be amended within the main Horizon portal with the exception of the "Corporate directory" which is set by the users provisioned on your Horizon service.

Please refer to the End User Guide for further information on adding and editing directory details http://gbc.gamma.co.uk/support/document-downloads.

4.9.2 Contacts – Adding "Favourite" contacts

In order to manage your "Favourite/Fixed" contacts you need to login to the Horizon website, where, if you have been assigned the soft console functionality you will see the receptionist tab under the call setup section.



Simply search for the internal contacts you wish to monitor and click add selected. Please note that you can only monitor a maximum of 200 contacts. Once added or removed, please click save to implement this list in your soft console view.

4.9.3 Contacts - Adding speed dials

All speed dial contacts can be added and amended against the user's account within the main Horizon portal.

Please refer to the End User Guide for further information on adding and editing speed dials http://gbc.gamma.co.uk/support/document-downloads.

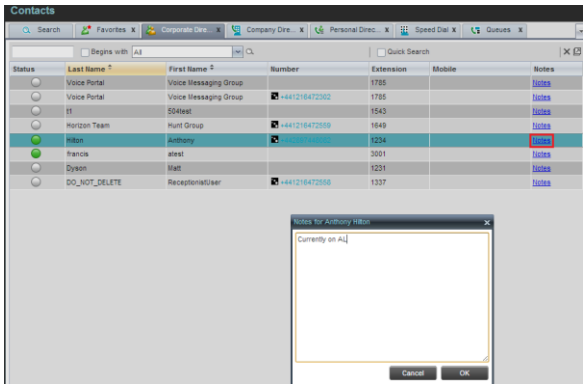
4.9.4 Contacts - Adding call queues

A user's membership of a call queue is controlled via the Horizon portal under call groups.

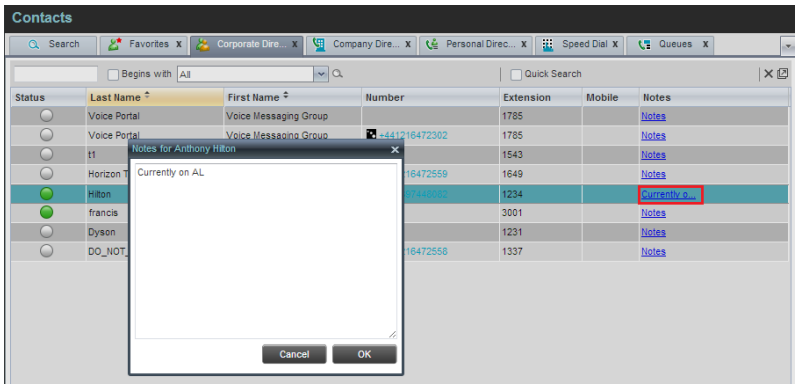
Please refer to the End User Guide for further information on adding a user to a call queue http://gbc.gamma.co.uk/support/document-downloads.

4.9.5 Contacts - Adding Notes

Specific notes can be added against a contact for internal use or to assist others using the receptionist console. To add a note, simply click on the highlighted blue text against the contact.

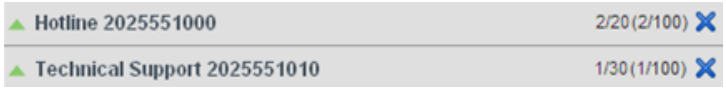


Type the note you wish to make and click "OK" to save the note against the contact. This will then show in the column if wide enough, or once clicked on open up the notes screen.



4.10 Queued Calls

This section of the receptionist console allows you to see up to 5 call queues that your user account is able to see within the Horizon service.



For each of these call queues, the following information is shown:

- The name of the call queue
- The primary number of the call queue
- The number of calls against the maximum queue size
- The number of calls in the queue against the maximum queue size

When you expand the call queue panel, a list of calls queued, their priority, and their position in the queue, is shown.

For each call, the following information is given:

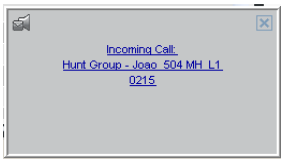
- Call status icon - a graphic representation of call state which could be one of the following:
  - The call is queued and waiting to be answered
  - An announcement is being played to the caller
  - The position of the call in the queue
  - The call has been bounced
- Name (if available) and phone number of the calling party
- The total call time

Clicking a call will expand the call to show additional information including:

- Position in the call queue
- Name (if available) and phone number of the call queue that was called
- Additional action buttons to implement further routing

4.11 Call Notification Window

If the browser is integrated with the Java plug-in a non-intrusive call notify window will be shown on the bottom right corner of the screen when the receptionist receives a call. This window displays the available caller information.



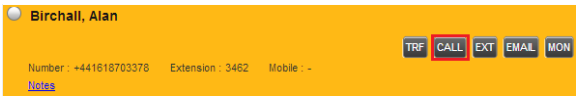
When a call is addressed to the receptionist, the option to answer the call or redirect it to voicemail is available from the call notification window.

5.0 Managing calls

In order to manage the calls using the receptionist console, you must be logged into the console and ensure your Horizon phone is either logged in through hot-desking or online. If it is not then incoming calls will be diverted to call forwarding or twinning and you will not have the option of answering calls in the console window.

To answer an incoming call simply use the "ANS" button against the required incoming call

For outgoing calls, simply select the user and click "Call"



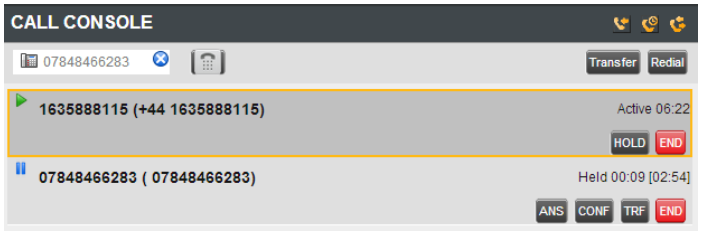
Or use the dialler to type a number and click the "Dial" icon

A call can also be made from the phone and would also show within the receptionist console.

5.1 Multiple calls

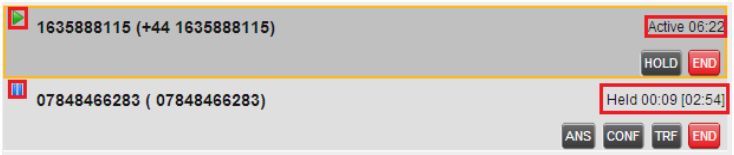
Multiple calls can be managed either via the receptionist console or from using the standard features of the Horizon service.

To move between calls in the receptionist console, simply click on the call to select and the relevant "Action" button, such as "ANS"



5.2 Timers

Timers are visible within every call and provide real time information to the user in order to make informative choices around call routing.

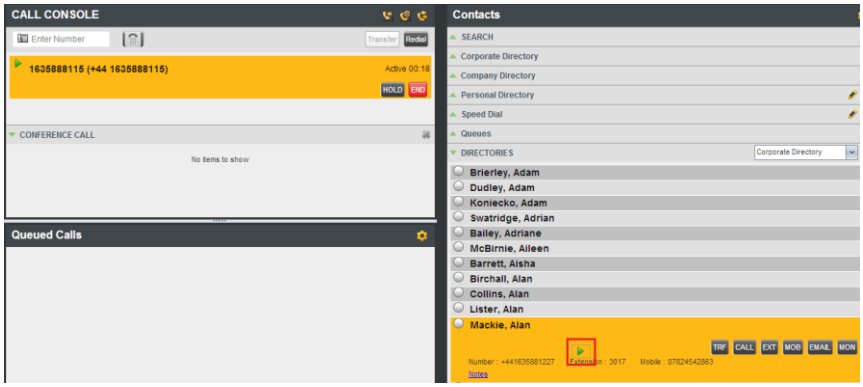


The latest state timer is always shown to the right of the total time shown in brackets.

5.3 Routing involving a contact

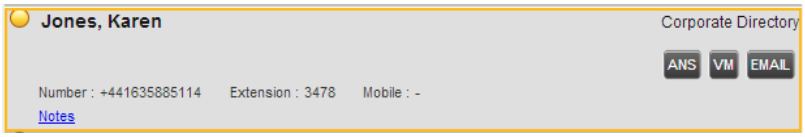
Where a call needs to be routed to a contact within the contact section of the console (assuming that drag and drop has been enabled) you can simply drag the call from the call console to the relevant contact.

As the contact is dragged, a small green arrow appears and you can place this on the required contact which opens it up. To action a transfer or other options, simply release the drag and then click the required "Action" button.



5.4 Picking up a contact on a monitored extension

If you have monitored a contact in the contacts section, you are able to pick up incoming calls for them when their monitored state is ringing, depicted by a yellow call state indicator.



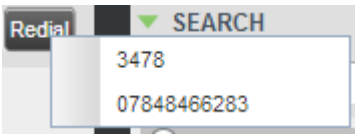
Once you have selected the contact, you can then take one of the following telephony actions:

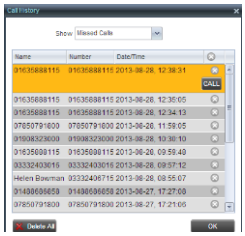
Answers the call on your phone

Sends the incoming call to the users voicemail

5.5 Redialling previous numbers

To redial previous numbers, you can either use the "Redial" button at the top of the call console or the call back feature within the call history section.



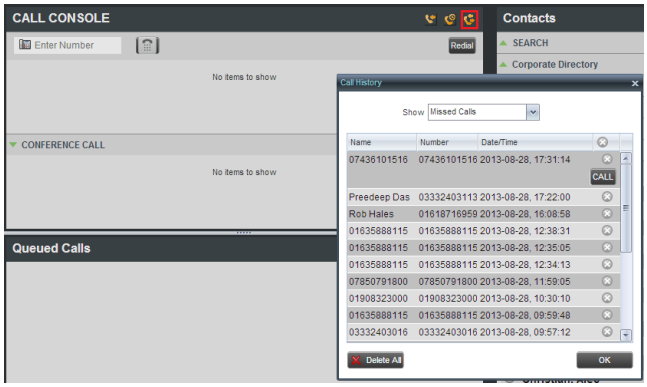


5.6 Dialling a speed dial

To dial a speed dial you have previously setup within the Horizon portal, simply open the speed dial section within the contact pane and click "Call" next to the required contact.

5.7 Call History

If you miss a call or wish to check all calls made, received or missed, you can simply click on the call History icon to ask the logs.



You then have the option to "show" the types of calls you wish to view (missed calls are set as default), and then take further options against each contact to call them if required. A "Delete All" button is also provided to reset the log if required.

5.8 Blind Transfer

A blind transfer occurs when a call is transferred without an introduction to the transferred contact, and can occur in any call state allowing quick and easy management of incoming calls from known callers.

To action a blind transfer, select the call in the call console to transfer, then either enter an external number in the dialler, or select a contact before clicking the "TXR" button. This will then transfer the call and it will be removed from the call console window.

By using monitored contacts, you can identify if a user is busy or not prior to transferring the call.

5.9 Consultative Transfer

A consultative transfer occurs when a call is transferred to a contact with an introduction to that contact to see if they wish to take the call and can occur in any call state allowing quick and easy management of incoming calls from known callers.

To action a consultative transfer, select the call in the call console to transfer and put it on hold. Call the required contact and ensure they answer to see if they wish to take the call. When ready to action the transfer, select one of the two calls and move the mouse over the non-selected call to click the "TXR" button.

The calls are then connected and removed from the call console.

5.10 Transfer to voicemail

You can transfer an incoming call to any monitored contact or your own voicemail whilst a call is in any call state allowing quick and easy management of incoming calls from known callers

To action a transfer to voicemail, select the call in the call console to transfer and select the contact you wish to transfer the call to. Once the contact details are open, simply click on the "VM" button of the contact to transfer the call.

5.11 Transfer to call queue

You can transfer an incoming call to a call queue in any call state allowing quick and easy management of incoming calls from known callers.

To action a transfer to a call queue, select the call in the call console to transfer and select the required call queue from the contact section. Once the queue details are available, simply click on the "TXR" button of the queue to transfer the call.

5.12 Call Park

You can park a call against a contact or hunt group which allows other contacts to then pick up the call. After a set amount of time, the call would be returned to the original user to ensure it is always dealt with.

To perform a call park, simply select the call in the call console and click on the "Park" button.

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Frequently Asked Questions

Status does not indicate if the user is available

Unlike presence, the BLF indicator or contact monitoring indicator only identifies if the phone is not currently in use. It does not state if a user is available to take a call.

Can I have the console in a different language?

At this time, the receptionist console is only available in English.

There is no button to resume a held call

The button is labelled "ANS" instead of un-hold.

How can I stop monitoring a contact?

For dynamic monitoring of contacts, it is not possible to remove a monitored contact however the system will start to remove old monitored contacts when the limit of 800 users is reached.

The console is not displaying newly assigned features

The receptionist will only pick up the latest configuration of a user's account when originally logged in. As such if changes are made it is necessary to restart the application by pressing F5.

I cannot always connect first time when pushing the "Enter" key on my keyboard

The console is designed to work this way as the dialler will first try to guess the phone number being entered before then connecting the number you actually typed.

I cannot make blind transfer calls using account codes

The console is designed to work this way as account codes can only be entered on consultative transfers.

Will any alpha tagging be seen on the console?

Yes - any alpha tags which are shown on the handsets will be shown on the receptionist console as the data is drawn from the same source.

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Appendix A – Keyboard shortcuts

Keyboard shortcuts are available to use within the receptionist console as follows:

Key(s)	Equivalent Mouse Action	Description
ESC	Click the close button in a dialog box	This closes the open dialog box, or any open editable box, such as a text box
/	Click the dialler text box	This places the cursor in the dialler text box. Please note some reported instances of this not working correctly have been reported in IE8
?	Click the search text box	This places the cursor in the search text box
ARROW DOWN	Click the scroll bar or the next item in the list	This selects the next item in the call console or queued call pane
ARROW UP	Click the scroll bar or the previous item in a list	This selects the previous item in the call console or queued call pane
PAGE DOWN	Scroll down one page	This goes to the next page in the call console or queued call pane
PAGE UP	Scroll up one page	This goes to the previous page in the call console or queued call pane
1……9	Select a call in the call console	Pressing “1” selects the first call, “2” the second……..
SPACEBAR	Click Answer on the selected incoming call in the call console	This answers the selected incoming call, or if no call is selected, the call that has been waiting the longest. Pressing the spacebar again answers the next call and puts the previous one on hold
.	Click End on a selected call	This ends the selected call
ENTER	Click Dial or Click Search	If the cursor is placed next to the dialler text box, the entered digits are dialled. If the cursor is placed next to the search text box, the search string is executed
+	Click Transfer in the dialler	This transfers the selected call to the ad hoc number entered in the dialler
S or s	Click on the Settings link	This opens the Settings page if the main window is in focus
B or b	Click on the Back to Application link	This goes back to the main page from the Settings window
R or r	Click the Call History button	This opens the Call History box
H or h	Click the Help link	This opens the Help link
Shift+L or l	Click the Sign Out link	This signs the user out of the application